

5.5 SEARCH ACROSS SURVEYS/CRM SEARCH ACROSS SURVEYS

Introduction

The Search Across Surveys option allow you to search for a specific ID (or ID string) within one or more surveys. You can specify items and/or control variables for up to three statistical periods to be displayed in the output. The parameters (items, control variables, stat periods) can be saved, as can the results of the search.

An extension to this search option is called the Customer Relationship Manager (CRM) Search Across Surveys. To use this option, you do not need to know the specific ID. You can search on a company's ALPHA identifier. As with the basic Search Across Surveys option, you can specify items and/or control variables for up to three statistical periods to be displayed in the output and you can save the parameters and the search results.

The basic Search Across Surveys option will be described first. The CRM Search Across Surveys screen will be described in Section 5.5.2. The output for both options will be described in Section 5.5.3.

Accessing the Screen

- Click on the TOOLS button from the StEPS Main Menu.
- Click on the QUERIES button from the Tools Menu.
- From the Queries pop-up menu, select Option 4: "Search Across Surveys" to display the following screen (Figure 5.5):

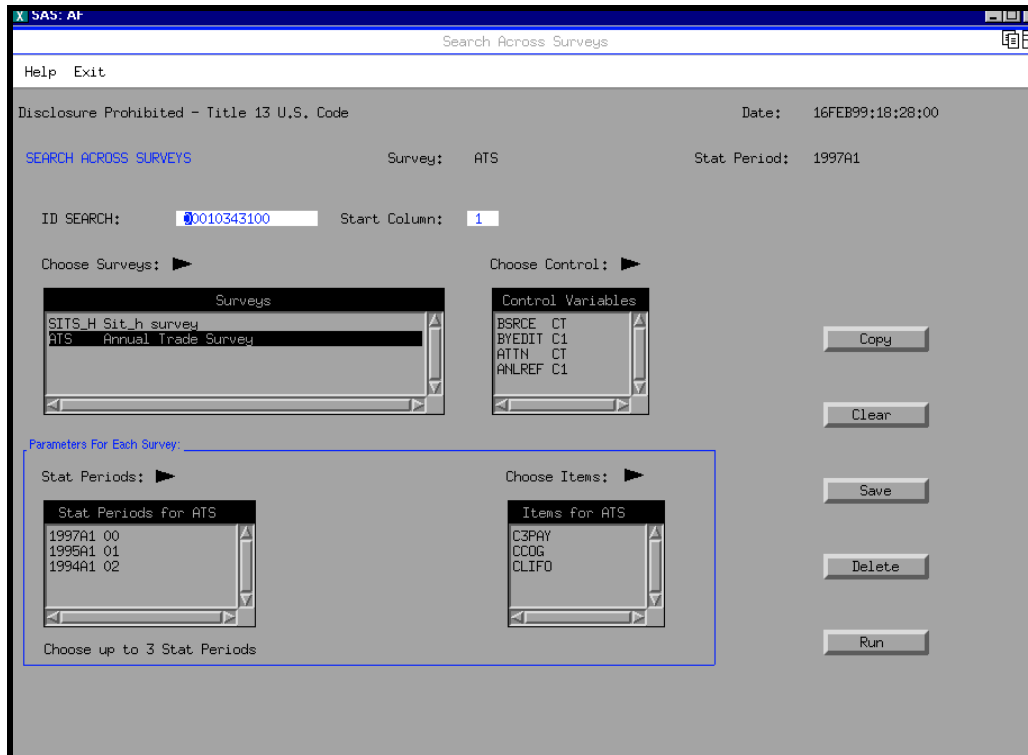


Figure 5.5 Search Across Surveys Input Screen

5.5.1 CREATING A SEARCH ACROSS SURVEYS

To create a search, you must specify:

1. The ID or ID string to search.
2. The start column for the ID string.
3. The surveys to search.
4. The control variables to display in the output.
5. The stat periods (for each survey) in which to search.
6. The items (from each survey) to display in the output.

Each of these six input fields is described below.

ID SEARCH

- Enter the ID or ID string on which to search.

Example: If you want to search several surveys for a particular ID, enter the ID. If you are not sure of the complete ID, you may enter a partial ID. The system will return all matches.

START COLUMN

- The START COLUMN allows you to search for a string beginning at any position in the ID field. Enter a number (from 1 to 16) to indicate the starting position for the search.

Example: If you want to search for all IDs containing the ID string '123456', in which '123456' begins in the 4th column (or position) of the ID, enter '4' in the START COLUMN field. Examples of matched cases might include 00012345610, 00512345621, 74312345602.

- The default START COLUMN value is '1'.

CHOOSE SURVEYS

- Click on the '►' in the "Choose Surveys" field to display a pick list of available surveys to search. This pick-list includes all surveys from the CENTRAL.SURVEYS file.
- Click on the surveys you want to search. An asterisk (*) will appear next to the surveys that have been selected. (The selected surveys will also appear in bold type.) Click on the survey a 2nd time to deselect it. You must select at least one survey.
- Once you have selected all of the surveys that you want to search, click on "OK".
- The surveys you have chosen will display in the "Surveys" box.
- Surveys selected from the pick list will replace surveys already displayed in the "Surveys" box. You cannot edit an existing list of surveys by selecting an additional survey from the pick list. You must reselect the entire set of surveys to make a change.

CHOOSE CONTROL VARIABLES

- Click on the '➤' in the "Choose Control" field to display a pick list of control variables from the Master and Statistical Period Control Files.
- The designation (CT, C1, or C2) next to each variable indicates the control file in which the variable is stored:

CT	Master Control file
C1	Statistical Period Control file
C2	Survey-specific Control file

- Select the variables that you want to include in the search output. Choose as many as you wish. An asterisk (*) will appear next to the variables that have been selected. (The selected variables will also appear in bold type.) Click on the variable a 2nd time to deselect it.

NOTE: You are not required to include control file variables in your search.

- Once you have selected all variables, click on "OK".
- The control variables you have chosen will display in the "Control Variables" box.
- Control variables selected from the pick list will replace control variables already displayed in the "Control Variables" box. You cannot edit an existing list of control variables by selecting an additional variable from the pick list. You must reselect the entire set of control variables to make a change.

CHOOSE PARAMETERS (STAT PERIODS AND ITEMS) FOR EACH SURVEY

For each survey listed, you may specify which data items to include in the search output. You may also specify from which statistical periods, data items and control file variables will be extracted. For each survey you want to search:

- Click on the name of the survey in the "Surveys" box.
- Select statistical periods and data items for that survey, as detailed in the following sections.

NOTE: You must repeat these same steps for each survey.

CHOOSE STAT PERIODS

- Highlight the name of a survey in the "Surveys" box.
- Click on the '➤' in the "Stat Periods" field to display a pick list of available statistical

periods for the survey specified.

- Select up to three statistical periods from the list. An asterisk (*) will appear next to the stat periods that have been selected. (The selected stat periods will also appear in bold type.) Click on the stat period a 2nd time to deselect it.
- Once you have chosen the stat periods, click on “OK”.
- The stat periods chosen (for the survey specified) will display in the “Stat Periods” box. The designation next to each stat period indicates the “relative” statistical period and will dictate the order of the variables in the output display.

00	Stat period selected 1 st from the list
01	Stat period selected 2 nd from the list
02	Stat period selected 3 nd from the list

- You **MUST** specify at least one stat period for each survey included in the search.
- Stat periods selected from the pick list will replace stat periods already displayed in the “Stat Periods” box (for the survey specified). You cannot edit an existing list of stat periods by selecting an additional stat period from the pick list. You must reselect the entire set of stat periods to make a change.

2. CHOOSE ITEMS

- Highlight the name of a survey in the “Surveys” box.
- Click on the ‘➤’ in the “Choose Items” field to display a pick list of items available for the survey specified.
- Select the items that you want to include in the search output. You may choose as many as you want.

An asterisk (*) will appear next to the items chosen. (The selected items will also appear in bold type.) Click on the item a 2nd time to deselect it.

NOTE: You are not required to include data items in your search output.

- After you have selected the items, click on “OK”.
- The items that you choose (for the survey specified) will display in the “Items” box.

- Item variables selected from the pick list will replace item variables already displayed in the “Items” box. You cannot edit an existing list of item variables by selecting an additional variable from the pick list. You must reselect the entire set of items to make a change.

The Utility Buttons

Utility buttons, located on the right side of the screen, allow you to do the following

COPY	Copy stored search parameters to the current input window.
CLEAR	Clear search parameters from the current input window.
SAVE	Save the current search parameters to a permanent file.
DELETE	Delete a search parameter file that had previously been saved.
RUN	Run the search using the search parameters currently displayed in the input window.

These are explained in detail below.

COPY

- To display parameters from a search you had previously saved, click on the COPY button.
- A pop-up window will display, listing the name of each parameter file, its description, and the date that it was last updated.

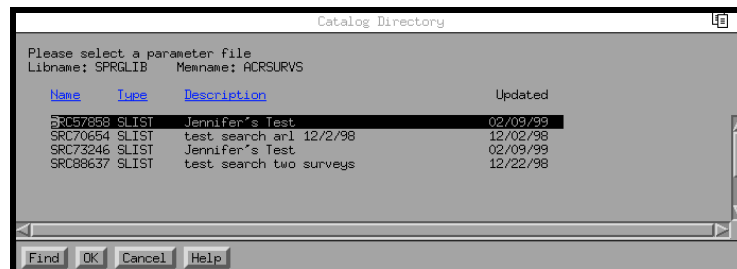


Figure 5.5.1a Directory of Stored Parameter Files

- Select a search parameter file using the mouse. The parameters stored in the file will display in the appropriate fields on the Search Across Surveys Input screen.
- Click on the FIND button to search for a particular search parameter file. This option will allow you to enter the name of the parameter file instead of scrolling through the list. This feature is useful if there are many stored parameter files.
- Click CANCEL to return to the Search Across Surveys Input screen.

CLEAR

To remove search parameters displayed on the screen, click on the CLEAR button. Use this utility to reset the screen and to begin constructing a new search.

SAVE

If you have entered search parameters and wish to store them for later use, click on the SAVE button. You will be prompted to enter a description for the file. Be sure to enter something that is meaningful and that will help you to distinguish this file from others.

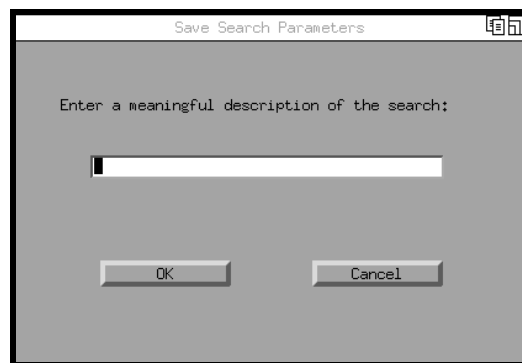


Figure 5.5.1b Save Search Parameters

- Click “OK” to save the search parameter file. A message will display, indicating that the search has been saved.

Search parameter files are saved to the special programs library (SPRGLIB) in the ACRSURVS catalog with a filename ‘src#####.slist’, where ##### is a randomly generated 5-digit number.

NOTE: The saved file is available for the default survey currently being processed. If you change your default survey, the parameter file cannot be accessed.

- Click CANCEL to return to the Search Across Surveys Input screen.
-

DELETE

- To delete an existing search parameter file, click the DELETE button.
- A pop-up window containing the name, description and last update of each search parameter

file stored in the special programs library (SPRGLIB.ACRSURVS) will display:

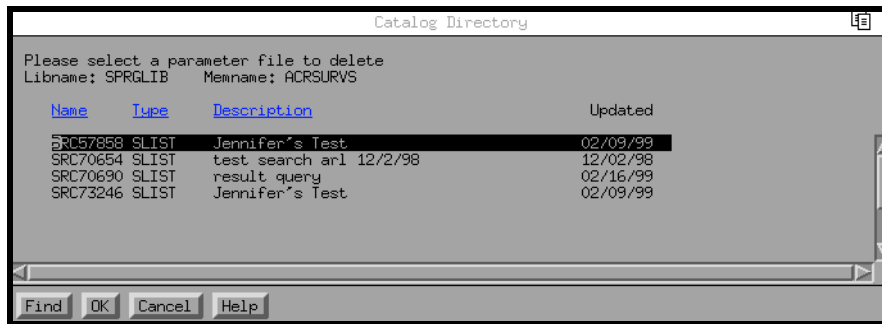


Figure 5.5.1c Delete Parameter File

- To delete the file, click on it. THE FILE WILL BE DELETED IMMEDIATELY!
- Only users with MGMTPRIV = 'P' may delete stored parameter files.

RUN

- To perform a search using the parameters specified on the input screen, click the RUN button. While your search is generating output, a message will display indicating the status of the search.

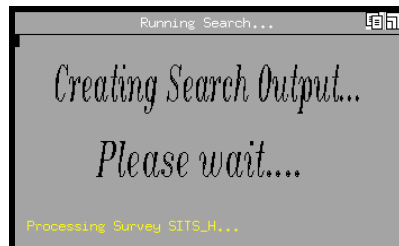


Figure 5.5.1d Search Status

- When the search is complete, a message will display indicating the number of records included in the output.

5.5.2 CUSTOMER RELATIONSHIP MANAGER (CRM) SEARCH ACROSS SURVEYS

The CRM search makes it easier to find data related to a specific company. You can search by the organization's ALPHA identifier in addition to searching by ID. As with the Search Across Survey screen, you can search for a partial ID.

Accessing the Screen

- Click on the TOOLS button from the StEPS Main Menu.
- Click on the QUERIES button from the Tools Menu.
- From the Queries pop-up menu, select Option 5: "CRM Search Across Surveys" to display the following screen (Figure 5.5.3):

SAS: Search Across Surveys

Help Exit

Please enter the substr of the id/alpha to search for across surveys.

Disclosure Prohibited - Titles 13 and 26 U.S. Code

Date: 16MAR04:10:24:41

CUSTOMER RELATIONSHIP MANAGEMENT Survey: NSURV Stat Period: 2000A1

SEARCH ACROSS SURVEYS

ID/ALPHA SEARCH:

Choose Surveys:

Choose Control:

Surveys

ACES	Annual Capital Expenditures Survey
ARTS	Annual Retail Trade Survey
ARTS_X	ARTS test survey for StEPS branch
ASMECB	ASM COMPUTER NETWORK USE SUPPLEMENT
ATS	Annual Trade Survey

Control Variables

ALPHA	CT
COLDTE	C1
FORM	C1
CKNDTE	C1
NAME1	CT

Parameters For Each Survey:

Stat Periods:

Choose Items:

Stat Periods for Survey

Items for Survey

Choose up to 3 Stat Periods

Copy

Clear

Save

Delete

Run

Figure 5.5.2 CRM Search Across Surveys input screen

This screen has five search specification options:

1. The string to search. This can be either a complete or a partial ID or ALPHA code.
2. The surveys to search.
3. The control variables to display in the output.
4. The stat periods (for each survey) in which to search.
5. The items (from each survey) to display in the output.

ID OR ALPHA SEARCH

- Enter the ID or ALPHA string on which to search.

Example: If you want to view information from several surveys for alpha 123456, enter the alpha '123456' as the ID SEARCH string.

If you want to search several surveys for a particular ID, enter the ID (instead of the alpha) as the ID SEARCH string.

You can also enter a partial search string. The system will return all IDs and ALPHA codes that match your input.

The following operations are the same as for the basic Search Across Surveys Screen (described in Section 5.5.1).

CHOOSE SURVEY

CHOOSE CONTROL VARIABLES

CHOOSE PARAMETERS (STAT PERIODS AND ITEMS) FOR EACH SURVEY

CHOOSE STAT PERIODS

CHOOSE ITEMS

In addition, the Utility Buttons are the same for both search options.

5.5.3 SEARCH OUTPUT

- Output will display on the “View Search Results” screen (Figure 5.5.3a).

	SURVEY	ID	E00100	E00101	E00500	E00501	E01000	E01001	E31400
42	SITS_H	00091179710	6	6	.	.	.	.	.
43	SITS_H	00091179711	0	0	.	.	.	.	.
44	SITS_H	00091179712	0	1	.	.	.	.	.
45	SITS_H	00091179713	2	2	.	.	.	.	.
46	SITS_H	00091196900	0	0	.	.	.	.	.
47	SITS_H	00091196902	34	116	.	19950701	19970630	19960630	.
48	SITS_H	35191185700	4	2	.	.	.	.	0
49	SITS_H	39191108500	0	.	.	.	.	.	.
50	SITS_H	62091151800	3	4	19960701	19950701	19970630	19960630	.
51	SITS_H	93091128300	.	0	.	.	.	.	.
52	SITS_I	00091113200	0	18	.	.	.	.	.
53	SITS_I	00091177500	0	0	.	.	.	.	.
54	SITS_I	00091177501	110	27	.	.	.	.	.
55	SITS_I	00091177502	0	1	.	.	.	.	.
56	SITS_I	00091189100	0	0	.	.	.	.	.
57	SITS_I	00091189101	34	37	.	.	.	.	.
58	SITS_I	00091189103	0	4	.	.	.	.	.
59	SITS_I	13391183100	0	.	.	.	.	.	.
60	SITS_I	22291187100	0	1	.	.	.	.	.
61	SITS_I	36391138400	0	0	.	.	.	.	.
62	SITS_I	52191146200	1	0	.	.	.	.	.
63		TOTAL	468	447	219587411	139664607	239649665	139725314	14

Figure 5.5.3a View Search Results Screen

- Each record matching the ID string you entered (beginning in the START COLUMN specified) will be displayed.
- If you specified data items in your search, the initial search results will include the SURVEY, ID, and the edited versions of the data items (as the default). You can then choose other view options to include additional variables in the output display.
- If you have specified control variables only (in your search), the results will include the SURVEY, ID, and the selected control variables in the output display.

The display options are described below:

VARIABLE LABELS

- Variables in the output display are labeled using the name of the variable as the base.

If the variable is a data item, there is a prefix which indicates the version of the data:

R	Reported data
E	Edited data
A	Adjusted data
W	Weighted data
F	Data flag

If the variable is stored by stat period (i.e., data items and control variables from the statistical period control files), there is a suffix indicating the relative stat period

00	1 st stat period selected from the list
01	2 nd stat period selected from the list
02	3 rd stat period selected from the list

Example: The variable ECAMIP00 is the edited version ('E') of the data item "CAMIP" for the first stat period (00) you selected from the list.

The variable SIC02 is the "SIC" for the statistical period (02) that you selected last from the list.

VIEW OPTIONS

- You may interactively customize the output display by selecting various view options (i.e., display data flags, display the "reported" version of the data, display control data). This is done using the View Options Box, shown as Figure 5.5.3b.
- To add data columns or remove them from the output display, click on the appropriate buttons from the View Options box and then click on the REFRESH button. When you click the REFRESH button, only the view options you have selected will display.
- Choosing options from the "View Options" box will not add variables or data items that you did not originally select for the search. It simply allows you to specify which output variables to

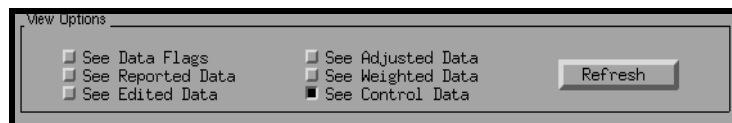


Figure 5.5.3b View Options Box

display on the screen.

SORT OPTIONS

- To sort the output display by survey identifier (i.e., ATS, MA22Q, SITS_H), select the “By survey ID” option from the “Sort Options” box. “Survey identifier” is the default sort option.
 - To sort the output display by ID, select the “By ID” option from the “Sort Options” box.
-

OTHER OPTIONS

- Position the cursor on the table and click on the right mouse button to see additional options for this screen. Options include printing the data set and/or subsetting the data set using a WHERE clause. If you choose to subset your data using a WHERE clause, the standard StEPS WHERE clause options appear.
-

SAVE SEARCH RESULTS

- To save the results of your search as a data set:
 1. Click on the UTILITY p-menu option.
 2. Click on the "Save Search Results" option.
- A pop-up menu will display prompting you to specify:
 - a libname (directory) in which to store the data set, and
 - a name for the data set.



Figure 5.5.3c Save Search Results

1. Enter the libname (directory) “STPSUSER”. (This is required.)
2. Enter a name for the data set.

P-Menus

Search Across Surveys

P-Menu	Options	Function
HELP	Search Across Surveys Help (F1) WhoamI (F7)	Display HELP information on using the Search Across Surveys screen Display user default and systems information
EXIT	StEPS Main Menu (Home) Exit (F3)	Return to StEPS Main Menu Exit to previous screen

View Search Results

P-Menu	Options	Function
UTILITIES	Save Search Results	Save search results as a data set.
HELP	View Search Results Help (F1) WhoamI (F7)	Display HELP information on using the View Search Results screen Display user default and systems information
EXIT	StEPS Main Menu (Home) Exit (F3)	Return to StEPS Main Menu Exit to previous screen